



FOREST LEGACY APPLICATION INSTRUCTIONS - YEAR 2002

Department of Natural Resources / Division of Forestry

State Form 50306 (7-01)

Purpose of Forest Legacy- The Indiana Forest Legacy program uses federal funds, and local matching funds, to purchase development rights and conservation easements on environmentally important forests in targeted areas of Indiana so these threatened remain intact and continue to provide traditional forest benefits. These forests remain in private ownership, except for the conveyed easement items (e.g. development rights) which become state owned and protected.

Deadlines: January 31, 2002 for priority consideration in 2002. However, applications are accepted anytime.

Submit completed application to:
(Please, retain a copy for your files.)

Dan Ernst
Forest Legacy Coordinator

IDNR – Division of Forestry

402W. Washington St., Rm. 296W
Indianapolis, IN 46204

Questions: Forest Legacy Coordinator
317-232-4101
dernst@dnr.state.in.us

Instructions

Page 1. Primarily seeks information on the ownership, location, and size of the parcel being nominated. The final section of page 1 seeks information about your ownership objectives. Please, describe briefly your property objectives.

Page 2. The information you provide on page two is heavily used in preliminary scoring and ranking of your proposal. This section helps to identify nominated parcels that have state, regional, or even national significance. Please, refer to the “Ecological Criteria”, and “Self Scoring “ insert for information on the scoring system and further description of the headings of this part of the application. These descriptions should be helpful in composing your responses.

Question “I” of page two is your assessment of how the nominated property is threatened by conversion to non-forest uses. Threat examples include: clearing for agriculture, housing, breakup into small unmanageable parcels, non native species invasion, coal or mineral mining, zoned for development, and many more.

On the bottom of page 2 you may add any additional comments about your property or your proposal that may be helpful in the evaluation of your application and property. Additional pages may be added if you need more space.

Page 3. This very important section asks you to identify what parts of your ownership you are willing to sell or convey to the Forest Legacy Program. It is not a commitment form, but should be considered very seriously. It will affect the desirability of your parcel and likely its appraised value. Please, indicate whether you wish to SELL, KEEP or are UNSURE each of the interests listed on this page. Do not leave any item unchecked. You may add other interests to this section if needed.

SELL means this is an interest you are interested in selling this right to the program. KEEP means this is an interest you wish to retain and keep full control. UNSURE means you need more information or have not yet decided on this interest. The accompanying brochure, "Indiana Forest Legacy", may help you in answering these questions.

Page 4. This section seeks financial information about your parcel and the parts of your ownership you are willing to sell or donate to the Forest Legacy Program. The information provided will also be used in scoring of your application and is held in confidence.

Property appraisals are not required to complete this section, but may be helpful in your estimates and deliberations. Any offer by the Forest Legacy Program to purchase easements will hire and utilize an appraisal conducted in accordance with federal yellow book appraisal guidelines. These appraisals are coordinated through the Indiana Department of Natural Resources near the end of the Forest Legacy parcel selection process.

The final part of page 4 asks for your approval for the Forest Legacy site reviewers to visit your property and to attest the information provided in your application. It is not necessary that all property owners sign this application. However, the person signing this application must have legal authority to represent this property and the owners.

"Self Scoring" Insert: This 2 page form allows you to do a quick scoring of your parcel. It is very similar to the score sheet used to prioritize all the applications received. **Please, complete this score sheet to the best of your ability and submit a copy with your application.**

APPLICATION PACKET CHECKLIST:

With your application, please submit each of the following items. If you cannot locate these items call the Forest Legacy coordinator for substitutes.

- _____ A thoroughly completed and signed application form
- _____ A completed "self scoring sheet"
- _____ Copy of road map indicating location of the property
- _____ Copy of the county plat map showing location of the property. Please outline the property and the proposed Forest Legacy area.
- _____ Copy of forest management plan, if available
- _____ Aerial photo of the property (Available at your local Farm Services Agency or Natural Resources Conservation Service office. Photos may also be available from the county auditor or surveyors office). Please outline property and proposed Forest Legacy area.
- _____ Map identifying dams, underground fuel tanks, dumps or waste disposal sites on the property
- _____ Map or list of permanent improvements on the nominated parcel (e.g. Roads, buildings, ponds, dams, wells, and other structures and approximate acreage occupied by improvements)
- _____ Any written comments you wish to provide in addition to the application.

Please Note: All submitted materials become property of the State and are non-returnable.

Disclosure of this information is voluntary. However, failure to provide all of the requested information will make it very difficult for your application and the property to be properly evaluated and scored.



FOREST LEGACY APPLICATION

Department of Natural Resources / Division of Forestry

Submit by January 31, 2002 for 2002 priority consideration

The Indiana Forest Legacy Program purchases development rights on forests of State and National significance in targeted areas of Indiana so these threatened forests may remain intact and provide traditional forest benefits.

Applicant information

Authorized agent for landowner if different

Landowner's name: _____

Agent's name: _____

Address: _____

Address: _____

Phone: _____

Phone: _____

Fax/e-mail: _____

Fax/e-mail: _____

Please list all co-owners of this property: _____

Property Information

1. County: _____ Civil Township: _____

2. Property is located in section(s) _____, Twp. _____ Range _____

3. What is the land currently zoned as? _____

4. Total property acres: _____ Total Acres Forest: _____

5. How much of the total acres above are you nominating for the Forest Legacy Program?

Forest acres: _____, Open or cleared acres: _____, Acres of Water: _____, Total: _____

6. I am interested in a _____ *conservation easement*, or _____ *transferring total ownership* of the land

7. Is any of this area enrolled in the Classified Forest or Classified Wildlife Habitat program? ___ Yes, ___ No

How many acres _____.

Landowner Goals and Objectives

1. Please, describe your long term goals and objectives for the nominated property. (e.g. It might help to think about - Why is the property important to you? Why do you own it? Why did you buy it? What would you like to do on and with this property?) You may attach an extra page if needed.

2. Do you have a written forest management plan? _____ If yes, please send a copy with your application. Have you been working with a forester who could provide technical information about your forest?

May we contact him/her? _____ Forester's name and phone #: _____

Please, help us picture the uniqueness of your property. Your comments should correspond to the Indiana Forest Legacy Parcel Evaluation – *Self Scoring* form, which must also accompany this application. You may attach extra pages if needed.

A. Riparian or Hydrologic Areas: (70 points) One of the most important "products" of forest areas is water and watershed protection. Explain the water resource values of the proposed property (rivers, lakes, streams, wetlands, etc).

B. Existing or Potential Public Recreational Opportunities: (40 points) Public recreation opportunities are defined as those having non-commercial and non-landowner users. Explain the recreational values of the proposed property.

C. Scenic Resources: (35 points) The scenic aspects of a natural resource area may often be subjective. Describe the special qualities making your parcel stand out as a scenic resource.

D. Known Cultural or Historical areas: (35 points) Material evidence of previous human occupation comprises a unique and irreplaceable resource, as do other historic features such as cemeteries, pioneer homesites, old grist and sawmill sites, etc. and natural landscape features. Explain the historical values of your parcel.

E. Provide Opportunities for Traditional Forest Uses: (100 points) Traditional forest uses provide timber and other forest products and amenities for an improved quality of life. Explain the traditional forestry values of the parcel.

F. Fish and Wildlife Habitat: (55 points) Protecting and enhancing wildlife features on and off the property is crucial to maintaining viable wildlife populations. Explain how your parcel contributes to healthy wildlife habitats.

G. Known Rare, Threatened, and Endangered species: (35 points) As urbanization and subdividing of forest lands continue, the need to give special attention to rare, threatened, and endangered species of fish, wildlife, and plants increases. Explain the rare plants and habitats found on or near your parcel.

H. Other Ecological Values: (30 points) In addition to the characteristics already outlined, a parcel may have other exceptional ecological conditions important to the area. Explain the other ecological values or important traits of your property (e.g. geology, proximity to public lands)

I. Type and Level of Conversion Threats: (60 points maximum) There are various kinds and degrees of threat to valuable forested areas, such as encroaching housing development, improved roads, sewer and power line extension into undeveloped areas and the dividing of land ownership in smaller parcels. Explain how your property is threatened by development or conversion to other uses, or can slow the development pressures in your area.

J. Acquirability or Manageability: (40 points) Even if a forested parcel is threatened with conversion to non-forest use, protecting it under the Forest Legacy Program is not always easy. Describe the level of support for your proposal and how it compliments other land conservation efforts.

Landowner's Comments

Other comments you may wish to add about your Forest Legacy Nomination or property uniqueness.

Confidential Financial Information

The following financial, deed and lien information shall remain confidential until such time as: 1) the application has been approved and all transactions are concluded, or 2) all title holders give written permission to release the information.

Financial Information

The following estimates are for preliminary use only. Any final offer for conservation easement purchase cannot exceed fair market value, as determined by an appraisal meeting federal appraisal standards.

- 1) What is the estimated total value of this property? _____
- 2) What is the estimated value of the interests (see page 3) proposed to be transferred by conservation easement to the Indiana Forest Legacy Program? _____
- 3) How was this value determined: _____ (examples: landowner's personal estimate, licensed appraiser, Realtor, written legal appraisal) Date of the appraisal: _____
- 4) Are you willing to donate part of the easement value? _____
 - What % are you willing to donate 25% _____ 50% _____ 75% _____ 100% _____ Other _____
 - What is your approximate asking price for the interests being offered? _____

NOTE: Donations may constitute a charitable contribution for income tax purposes, depending on applicable Internal Revenue Service guidelines and regulations.

Comments

Liens and Encumbrances

Please, list any and all liens and encumbrances on the property proposed for enrollment in the Indiana Forest Legacy Program. Examples: Mortgages, Utility easements, public rights of way, water flow or water use restrictions, septic systems or water easements, deed restrictions or covenants, mineral extraction rights (gas, oil, coal, stone, etc.), tax liens, dump sites, underground fuel tanks, other environmental hazards, etc.

Preliminary Identification of Rights to be Retained and Sold

It is important the following section be carefully and fully completed. The information you provide will directly affect the desirability of the parcel, appraised value and its priority as an Indiana Forest Legacy parcel. Please, indicate which of the following uses or interests you wish to **keep** and which uses or interests you wish to **sell** as part of the conservation easement.

Note: Checking **sell** or **keep** does not commit you to anything at this time, it merely assists the Forest Legacy Committee when inspecting, prioritizing and evaluating your parcel. Also, note that development rights are the minimum rights purchased on Forest Legacy Tracts and therefore are not included on the list below.

KEEP SELL UNSURE

Forest use or interest

_____	_____	_____	The right to manage and harvest timber
_____	_____	_____	The right to collect mushroom, herbs, and craft items (e.g. grapevines)
_____	_____	_____	Mineral rights - unrestricted access to minerals (e.g. coal, gravel, etc.) *
_____	_____	_____	Mineral rights - with restricted surface occupancy rights**
_____	_____	_____	Oil and gas rights - unrestricted access with oil and gas*
_____	_____	_____	Oil and gas rights - with restricted surface occupancy rights**
_____	_____	_____	Right to limit or control public access to your property
_____	_____	_____	The right to graze open areas (acres _____)
_____	_____	_____	The right to farm open areas (acres _____)
_____	_____	_____	The right to build or rebuild roads (other than forest management/protection roads)
_____	_____	_____	Ownership of existing buildings and other improvements . Please specify improvements and acres:
_____	_____	_____	I would like to sell or transfer the entire property to the legacy program.
_____	_____	_____	Other. Please specify: _____

* Retention of unrestricted mineral or oil/gas rights will exclude that portion of your property from consideration in the Indiana Forest Legacy Program.

** Retention of restricted mineral or oil/gas rights which allows less than 10% surface disturbance may be consistent with the Indiana Forest Legacy Program.

Testimony and Permission

The information in this application is true to the best of my knowledge and belief. I (we), as the land owner or landowner's authorized agent (proof of authorization must accompany the application) agree allow inspection, appraisal and survey of my property being offered for consideration under the Indiana Forest Legacy Program. I agree to allow members of the Indiana Department of Natural Resources, the Indiana Forest Legacy committee or their designated staff to inspect my property at any reasonable time for the purposes of this application. I understand I shall be notified in advance of all inspecting visits.

I also understand that this property (i.e. conservation easement) will not be purchased if negotiations do not reach an amicable agreement or if the property does not meet the needs or qualifications of the Indiana Forest Legacy Program. Conservation easements will only be purchased from willing sellers.

Signature(s) of landowner(s) or legal agent

Date

Mail completed application to:

_____	_____	Forest Legacy Coordinator
_____	_____	Indiana Division of Forestry
_____	_____	402 W. Washington, Rm. 296W
_____	_____	Indianapolis, IN 46204
_____	_____	Questions: 317-232-4101



INDIANA'S FOREST LEGACY PARCEL EVALUATION—Self Scoring – Year 2002

Department of Natural Resources / Division of Forestry

-PLEASE CIRCLE POINTS SCORED-

A. Watershed Protection and Water Quality Values: (70 points maximum)

- 15 pts** * Parcel has over 1,000 feet of perennial waterway shoreline, **or**
10 pts * Parcel has 300'-1,000' perennial waterway shoreline, **or**
5 pts * Parcel is situated on a river or perennial stream, but less than 300' frontage or more than 1,000' on a major intermittent stream
- 5 pts** Parcel includes 100 year floodplain at least 100 feet wide
- 15 pts** Parcel is within a regional drinking water aquifer area or within 1 mile of a public water supply lake. **Or,**
10 pts Parcel drains into a public water supply lake.
- 10 pts** Parcel is adjacent to identified permanent watershed protection area or within a priority watershed.
- 15 pts** Parcel contains a wetland larger than 2 acres in size
- 10 pts** Parcel drains into a natural wetland larger than 2 acres within 1/2 mile

Your score _____

B. Public Recreational Values: (40 points maximum)

- 10 pts** Proposed parcel has access to a public water body, **or**
5 pts Adjoining parcel has water based recreation open to the public
- 5 pts** Proposed parcel has access to a public trail system, **or**
2 pts Adjoining parcel has trails open to the public
- 5 pts** Proposed parcel has other outdoor recreation opportunities open to the public, **or**
2 pts Adjoining parcel has other outdoor recreation open to the public
- 15 pts** Parcel adjoins public lands
- 5 pts** Parcel adjoins protected private lands or is within 1 mile of public lands

Your Score _____

C. Scenic Resource Values: (35 points maximum)

- 20 pts** Parcel has at least 1,000' frontage on a designated scenic route, **or**
15 pts Parcel has 1-1,000' frontage on a designated scenic route
- 15 pts** Parcel is part of an important, regionally known scenic view, **or**
10 pts Views of or from parcel are well known, locally important scenic views

Your Score _____

D. Cultural or Historical Values: (35 points maximum)

- 15 pts** Parcel contains an historic forestry site (e.g. grist/sawmill) in good to excellent condition, **or**
5 pts Condition of historic forestry site is fair to poor
- 20 pts** Site contains other documented historic sites in good to excellent condition, **or**
10 pts Site contains one other documented historic site in fair condition, **or**
10 pts No historic sites documented, but there is a high probability of significant sites being present

Your Score _____

E. Traditional Forest Values: (100 points maximum)

- 30 pts** Parcel grows great timber (>80% of area has site index >80' for Red Oak or 95' for Tulip Tree), **or**
15 pts Parcel grows fair/good timber (Average site index >70' for Red Oak or 85' for Tulip Tree)
- 20 pts** At least 85% of the parcel can be accessed by 4-wheel drive tractor or log skidder, **or**
10 pts 65-85% of the parcel is accessible by tractor
- 10 pts** Parcel has been actively and well managed by the current owner, **or**
5 pts Parcel has an existing forest stewardship plan, but has not been actively managed the past 10 years
- 5 pts** Parcel is enrolled in the Classified Forest or Wildlife Habitat Program
- 10 pts** Parcel is relatively free of invasive and exotic species
- 15 pts** Parcel is greater than 160 acres in size. Or, greater than 40 acres in sparsely forested areas (<10% forest)
- 10 pts** Parcel has established research plots or educational facilities

Your Score _____

F. Fish and Wildlife Habitat Values: (55 points maximum)

- 20 pts** Parcel is located in rural area (less than 3 houses within or businesses within 300 feet/mile of boundary), **or**
10 pts Parcel is located in semi-rural area (less than 6 houses or businesses within 300 feet/mile of boundary)
10 pts Parcel contains a mix of wildlife habitat types
15 pts Parcel is connected to at least 80 acres of other forest and riparian areas
10 pts Parcel contains at least 1 perennial water source for wildlife/80 acres, **or**
5 pts Parcel contains 1 perennial watering site/160 acres
or is within ¼ mile of a significant watering site.

Your Score _____

G. Endangered Species Values: (35 points maximum)

- 15 pts** Parcel supports at least 3 rare, threatened or endangered (RTE) species, **or**
10 pts 1-2 RTE species supported and documented on the parcel, **or**
5 pts No RTE species have been documented on the parcel, but habitat type is diminishing or has high likelihood of supporting RTE species in a sustainable manner
15 pts Parcel contains an Indiana Heritage Database site
5 pts Parcel is within 1 mile of an Indiana Heritage Database site

Your Score _____

H. Other Ecological Values: (30 points maximum)

- 10 pts** Parcel is part of a large contiguous forest block at least 500 acres in Northern Indiana, or 5,000 acres in southern Indiana, **or**
5 pts Parcel is part of 200 acre (north) or 1,000 acre (south) contiguous block of forest
5 pts Parcel contains more than 3 ecological communities, **or**
2 pts Parcel contains 2-3 ecological communities
5 pts Parcel includes ecological communities which are dwindling or uncommon in Indiana
10 pts Parcel contains old growth forest or forest undisturbed for at least 50 years

Your Score _____

I. Conversion Threats to Parcel: (60 points maximum)

- 10 pts** Public water or sewer systems are within 2 miles of the parcel, **or**
5 pts Public water or sewer systems currently exist at parcel
10 pts at least 50% of site suitable for development (e.g. soils, slope, can be divided into 3-5 acre lots)
10 pts Parcel has more than 5,000 feet of public road frontage, **or**
5 pts Public road frontage is 1,000-5,000 feet
10 pts Parcel is within 20 miles of a city of at least 20,000 people
10 pts Parcel is within 5 miles of a town of at least 5,000 people (different city than previous question)
10 pts Parcel is within 5 miles of interstate exchange
5 pts Parcel contains more than 3,000 bd ft/acre of commercial timber
5 pts Property has other unique characteristics to attract development (e.g. river, lake, high quality paved road)
5 pts Property is currently listed for sale

Your Score _____

J. Acquirability or Manageability of Parcel: (40 points maximum)

- 10 pts** There is written support to purchase this parcel from DNR, Land Trusts or other conservation groups
10 pts Owner has expressed willingness to sell the easement at least 25% below market value, **or**
10 pts There is written **financial** support from DNR, Land Trusts or other conservation groups
5 pts Parcel is absent of significant environmental hazards and in good ecological condition
5 pts Traditional forest uses are compatible with parcel's natural values
5 pts Current adjoining land uses are compatible with Forest Legacy Program
10 pts Owner is willing to protect adjoining open land from development by a conservation easement

Your Score _____

Other factors – check appropriate items

- ____ Owner is not reserving or withdrawing any buildings sites from the eligible ownership
____ 100% of the easement area is forest
____ There is written active support from the community for this legacy parcel
____ Parcel adjoins another accepted or nominated forest legacy parcel
____ Parcel compliments other federal investments or initiatives (e.g. wetland reserve area, watershed projects)
____ At least 50% of the easement value is be donated or paid for by other sources
____ Parcel conveys rights in addition to development and mineral rights (e.g. public access)

Your Total Score _____